

# Knowledge Work Automation:

BUILDING YOUR AI ENHANCED WORKFLOW ROADMAP



# SPEAKERS

## **Ryan O'Connell**

- Solutions Architect at M-Files

## **Frank Taliano**

- Senior Director, Product Management at M-Files

# AGENDA

Orientation: The promise of AI (what can AI do well?)

Group Activity 1 – Identifying improvement opportunities

Orientation: Practical automation approaches (how to apply AI?)

Group Activity 2 – Applying AI and automation into daily work

Roadmap execution best practices (how to execute change programs?)

Summary

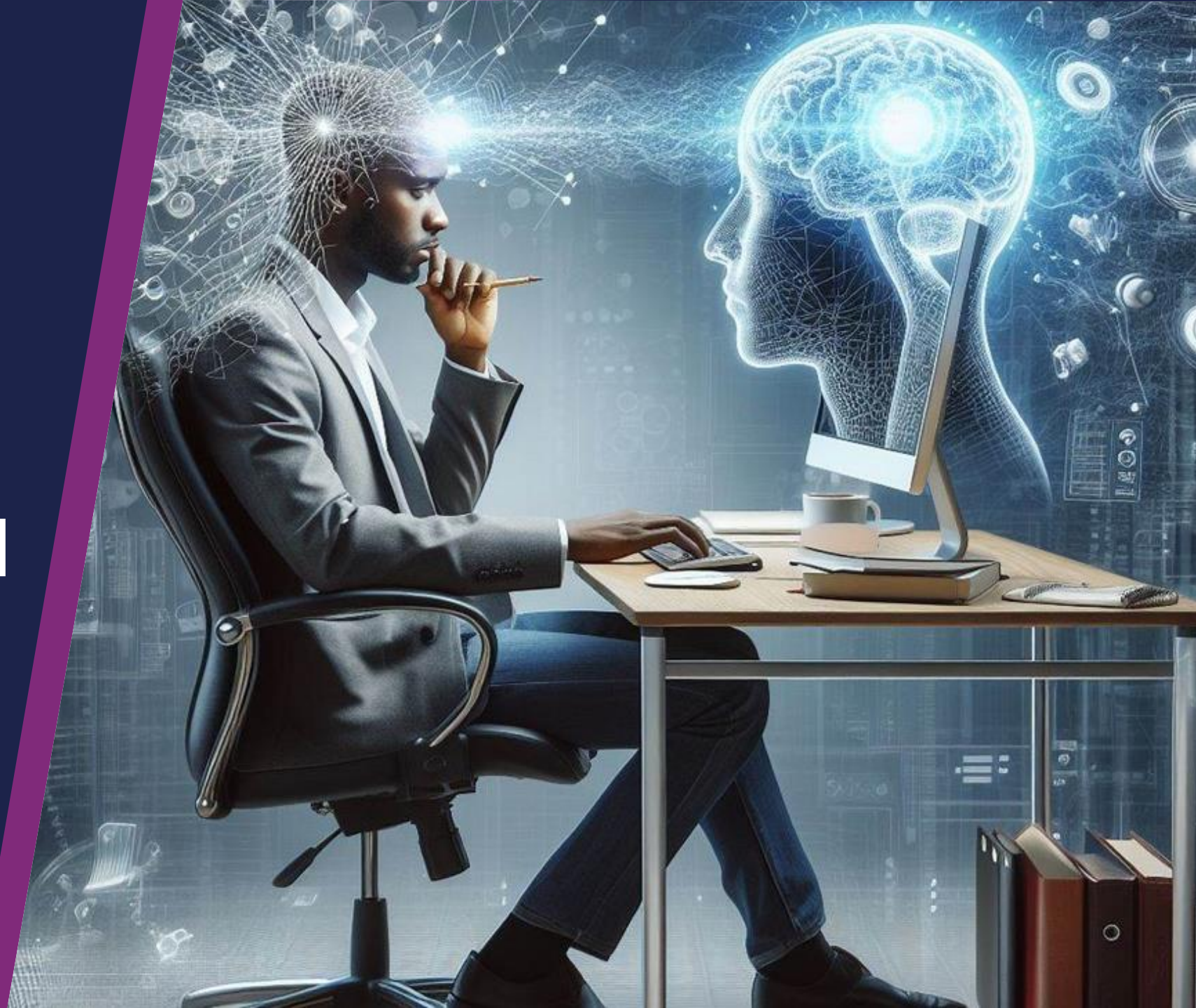


Let's start with the polling questions.



# NEW ERA FOR HUMAN- MACHINE INTERACTION

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# MEETING MINUTES AND TRANSCRIPTIONS





# DRAFTING TRANSLATING VERSIONING

M-Files





**IMAGES  
VIDEOS  
MUSIC  
SPEECH**

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# UNLOCKING ORGANIZATIONAL KNOWLEDGE

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# AUTOMATING WITH AGENTS

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# EXAMPLES

Basics: summarize this annual report

Action: Create a list of action points from these meeting minutes

Validation: Does this contract have a termination clause?

Rules: If the deal value is above \$10M, send for CEO approval.

Insights: The new AI guide is the most popular doc. this week.



**SO, DOES IT ALL JUST WORK?**  
**ARE THERE ANY OBSTACLES?**



ESTT SLA 03-2024 DRAFT 2

✖ OLD VERSION

VV

ESTT Service Level Agreement, March 2024

ement, March 2016

✖ ARCHIVED

Office 365 SLA

✖ WRONG SERVICE

AdobeSign EU SLA

Big Corp SLA, March 2024

✖ WRONG COMPANY

What is the SLA penalty for delayed response?

2023-2024 Services and Terms

✖ WRONG PRODUCT

ESTT SLA 03-2024 DRAFT

✖ OLD VERSION

ement, March 2020

✖ EXPIRED

Oracle DB Tools SLA

Service Level Agreement

✖ WRONG

RE: SLA renewal discussion

✖ WRONG CONTEXT

DocuSign - SLA

✖ WRONG

SLA Guidelines for Third-party Engagements

Financial compensation for SLA KPIs

✖ SHOULD I EVEN BE ABLE SEE THIS?!

What is the SLA penalty for delayed response?



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...for ESTT

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...this year...2024

What is the SLA penalty for delayed response?

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...the one that's the final ("FINAL!!") copy



What is the SEA penalty for delayed response?

...for ESTT

...this year...2024

...the one that's the final ("FINAL!!") copy

...not the draft from Joe

...for ESTI

...this year...2024

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nvm

# THREE FOUNDATIONAL ELEMENTS TO GET RIGHT



## Connectivity

AI needs access to the right information resources to provide real value.



## Confidentiality

AI must comply to the organization's information security policy and must not disclose information to which the user is not entitled.



## Curation

AI should only access relevant and up-to-date information to ensure accuracy of responses.



**THAT IS WHAT M-FILES DOES**

**IN THIS WORKSHOP, WE CAN ASSUME THAT  
UNDERLYING DATA ISSUES ARE  
ALREADY SOLVED**

# GROUP ACTIVITY 1

# GROUP ACTIVITY 1

For 15 minutes

Discuss in your groups

- Which processes are frustrating and require a lot of manual work?
- Which of them include documents, text and data that AI now understands?
- How to rank them based on occurrence, complexity, impact of a solution?

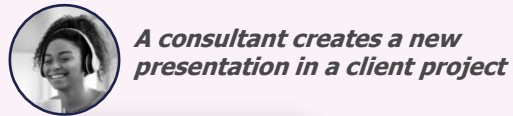
For 15 minutes

Have your Group representative present your findings



# PRACTICAL AUTOMATION APPROACHES

# FROM MANUAL PROCESSES....



**A consultant creates a new presentation in a client project**

01 Open PowerPoint, start creating

02 When done, press save

03 Choose where (OneDrive, SharePoint, Teams)

Where? 04 Navigate into the right folder

05 Give a name to the document

What?

06 Check access rights

Who?

How? 07 Share a link to the project manager



**The project manager reviews and approves the presentation**

08 Review and edit the document

What?

09 Save the final document with a new name

10 Email the approved document with a new name

11 Email the approved document to the customer

How?

12 Notify the consultant



# ....TO KNOWLEDGE WORK AUTOMATION



**A consultant creates a new presentation in a client project**

01 Select "Create document" from M-Files and select the template

02 M-Files automatically fills in client and project details, creates a document name, sets permissions, and places the document into the deliverable workflow

03 After finishing press "Send for approval"



**The project manager reviews and approves the presentation**

04 Open PowerPoint, review and edit the document

05 After finishing, select "Approval"

06 M-Files automatically shares the document in the client portal and notifies the consultant of the approved status



**END-TO-END AUTOMATION**



# VALIDATING A CONTRACT

Are the contracting parties defined?

Does the contract have start and end dates?

Does this contract have a termination clause?



# CREATING A CONSULTING PROJECT PROPOSAL BASED ON AN RFQ

Insert three best references matching this opportunity.

Fill in the project phases based on these requirements.

Populate the staffing based on availability and CV match.

Calculate price and add basic contract terms.

# STAYING COMPLIANT AGAINST COMPANY POLICIES

If there are non-standard clauses, send to legal review.

If the value is above \$10M, send for CEO approval.

Keep the account exec and service lead aware of progress.

# GROUP ACTIVITY 2

# GROUP ACTIVITY 2

For 15 minutes

Select a process from Activity 1 and discuss in your groups

- How to break the process down into smaller individual steps?
- Which of them could be automated with AI?
- What guardrails would be needed in the end-to-end process? E.g. regulatory requirements for a person to sign-off?

For 15 minutes

Have your Group representative present your findings



# BREAK DOWN PROCESSES INTO SMALL STEPS

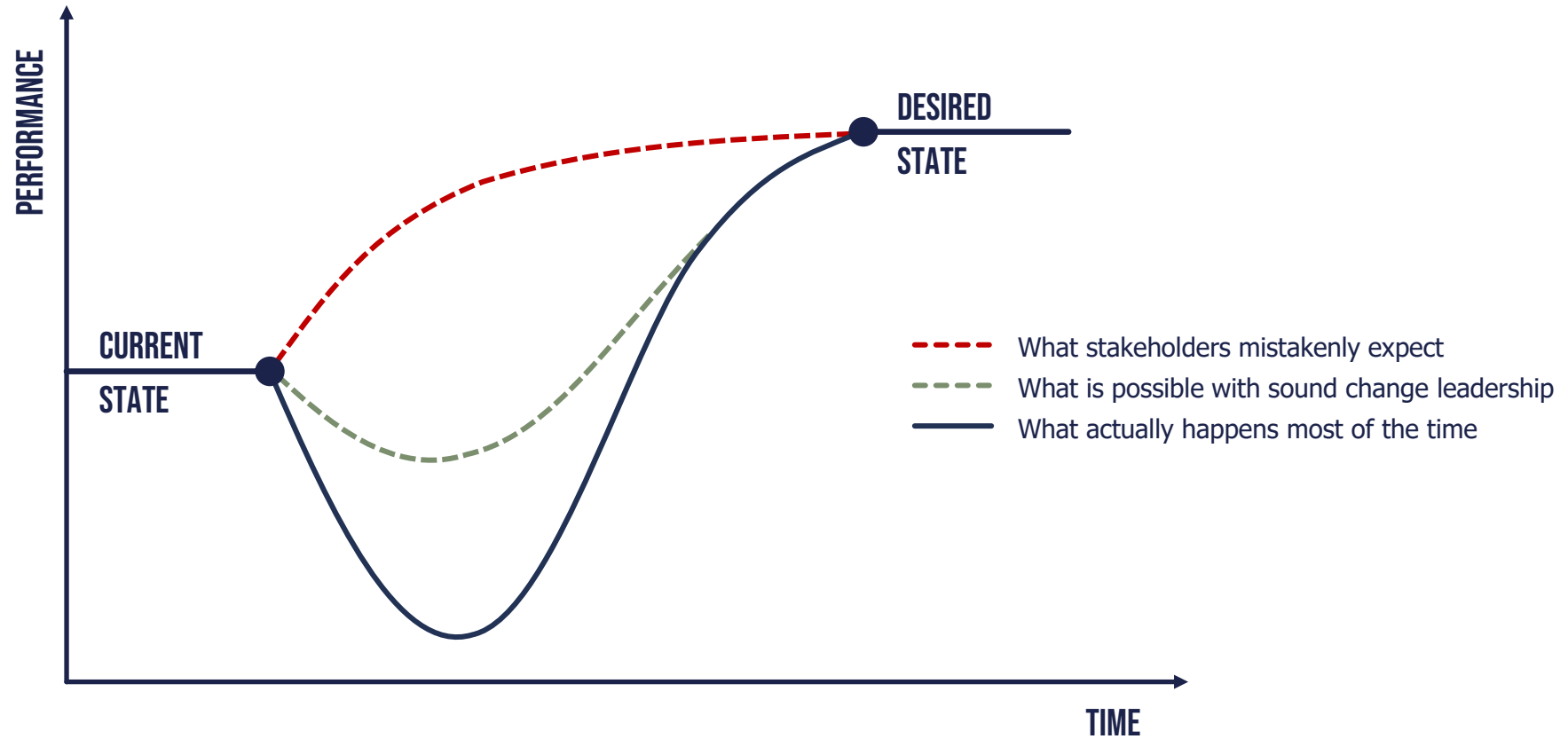
## THINK ABOUT WHAT COULD BE AUTOMATED

### **Validating an incoming NDA**

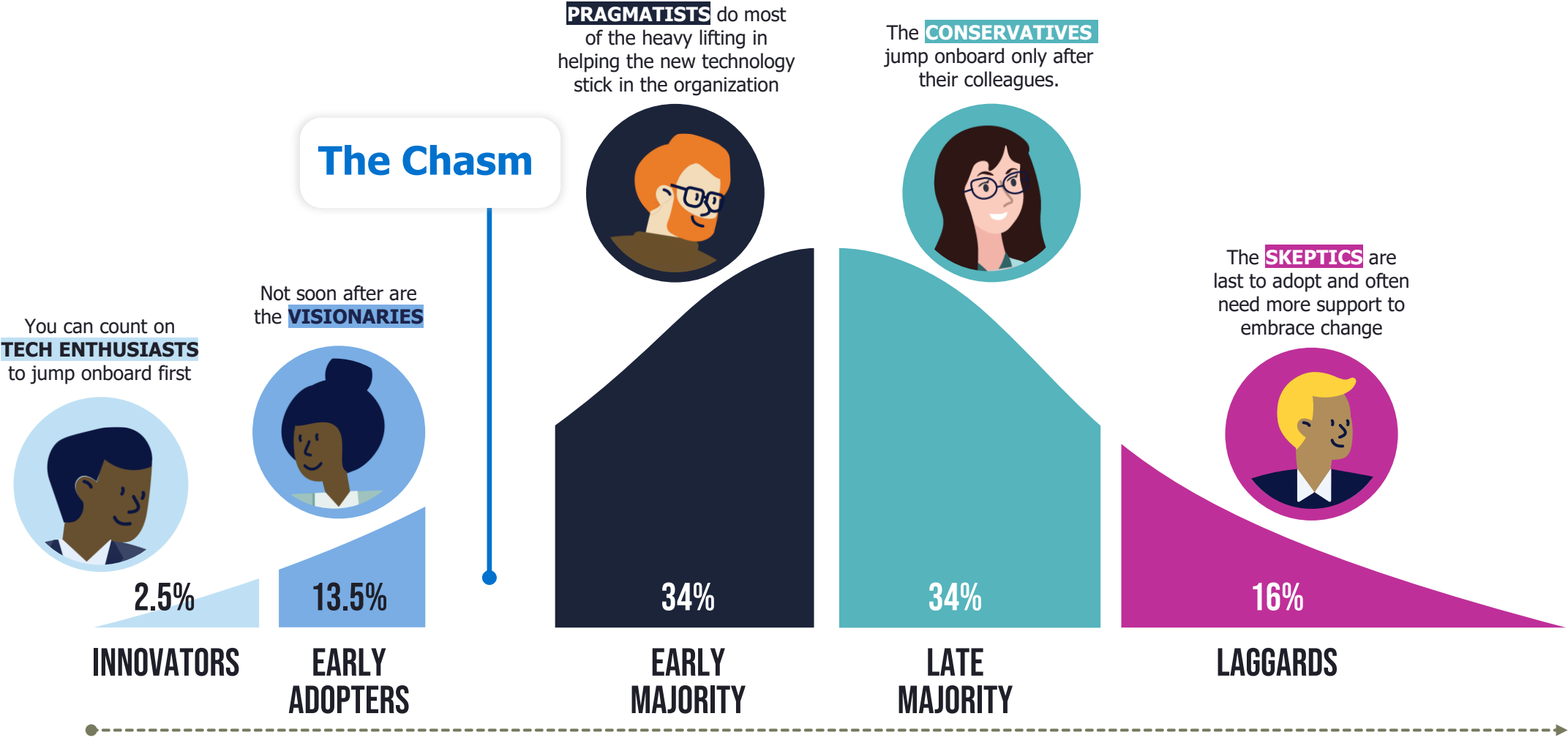
- Step 1 :validate that the document is of the right type: an NDA.
- Step 2: validate key part of the content: parties defined, term a, b and c exist
- Step 3: extract deadlines
- Step 4: create assignments for people based on the deadlines

# ROADMAP EXECUTION BEST PRACTICES

# LEADING CHANGE



# DRIVING ADOPTION





# ESTABLISH A CLEAR VISION

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# ENGAGE ORGANIZATION TO SHAPE THE DETAILS





# COMMUNICATE PROGRESS

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# DEPLOY GRADUALLY, LEVERAGE CHAMPIONS

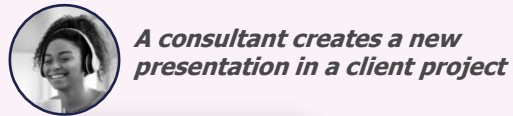
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# SUMMARY

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**END-TO-END AUTOMATION**





## **THE APPROACH FOR AI ENHANCED WORKFLOWS**

- 1 IDENTIFY AND PRIORITIZE OPPORTUNITIES**
- 2 BREAK DOWN PROCESSES INTO MANAGEABLE STEPS**
- 3 COMMUNICATE AND ENGAGE BEFORE EXECUTING**

# WHAT TECHNOLOGY PLATFORM IS GOOD FOR DOING ALL THAT WE HAVE TALKED ABOUT.

## UNDERSTANDING YOUR ORGANIZATION'S MATURITY



THE MODEL HELPS  
UNDERSTAND THE  
BIG PICTURE

- 1 WHERE ARE WE IN OVERALL MATURITY?
- 2 ARE WE BALANCED OR IS SOME AREA LAGGING?
- 3 WHAT MORE CAN BE ACHIEVED?





# ***M-Files***®

*The Smarter Way to Work.*

## **Thank You**